



north lake tahoe

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Marketing Staff Report

Date: October 5, 2016

To: Board of Directors

From: JT Thompson, Tourism Director

RE: Marketing Update

DestiMetrics:

Attached you will find our Executive Summary for August 2016. The month of August saw modest gains in occupancy with a slight dip in rate (ADR). YOY increase in occupancy of 1.4% and ADR was down 4%.

We are still seeing on the books reservations for the next six months rising dramatically by 38%, and incremental pacing for the month of August vs. previous year with a strong 61% increase.

We are looking forward to a strong Fall/Early Winter Season!

Autumn Food & Wine:

31st Annual AFW was another great success. The final ROI report has yet to be completed, but with 1700 tickets sold for this year's event, 300 more than last year, we are very happy with the outcome.

Spartan World Championships:

Spartan is back for another year this past weekend. The promoters are stating an increase in participation, but not willing to give out the final numbers until after the event is completed. We have a Visitor Information Booth set up in the vendor village to assist their participants and spectators.

We are in current negotiations for the 2017 and 2018 events and will update the Board once these negotiations completed for approval.

DESTINATION LEVEL RESERVATIONS ACTIVITY SUMMARY

Produced by DestiMetrics, LLC. Presented as a community service by the North Lake Tahoe DestiMetrics subscribing organization



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Destination: North Lake Tahoe

Period: Bookings as of Aug 31, 2016

Executive Summary - Year over Year Variance and Analysis

Data based on a sample of up to 11 properties in the North Lake Tahoe destination, representing up to 1,522 Units ('DestiMetrics Census'*) and 47.1% of 3,229 total units in the North Lake Tahoe destination ('Destination Census'**)

MARKET OVERVIEW: Though the formal end of the summer season isn't until October 31, the peak months came to a close with the end of August and the Labor Day weekend (not included in this data). As in recent months, financial and consumer markets were very strong during this period. The Dow Jones, though relatively flat, remained near record territory at the end of August, despite downward pressure from global markets and a disruptive and unique Presidential election campaign. Employers added 151,000 new jobs during the month, bringing the 3-month total to 697,000 jobs added and boosting consumer confidence above the 100-point mark for the first time since September 2015. All of this is reflected in excellent performance numbers in the mountain travel industry. Based on an aggregate data from all DestiMetrics destinations, occupancy for August was up 2.2 percent versus the same time last year, while rate was also up 6.8 percent for the month. Bookings taken in August for arrival in August was down -3.7 percent (not shown). Locally, North Lake Tahoe occupancy was up 1.4 percent in August versus 2015, accompanied by a decrease in rate of -4.0 percent. North Lake Tahoe occupancy for the past six months (March - August) was up 11.0 percent for the period compared to same period last year, while rate increased 4.5 percent. Bookings taken in August for arrival in August were up 12.8 percent compared to bookings taken in August 2015 (not shown).

		Year over Year		
		2016/17	2015/16	% Diff
a. Last Month Performance: Current YTD vs. Previous YTD				
Occupancy Rates during last month (August, 2016) were up (1.4%) compared to the same period last year (August, 2015), while Average Daily Rate was down (-4.0%).	Occupancy (August) :	67.7%	66.7%	1.4%
	ADR (August) :	\$267	\$278	-4.0%
b. Next Month Performance: Current YTD vs. Previous YTD				
Occupancy Rates for next month (September, 2016) are up (13.1%) compared to the same period last year, while Average Daily Rate is also up (3.5%).	Occupancy (September) :	55.2%	48.8%	13.1%
	ADR (September) :	\$225	\$218	3.5%
c. Historical 6 Month Actual Performance: Current YTD vs. Previous YTD				
Occupancy Rates for the previous 6 months (March - August) are up (11.0%) compared to the same period last year, while Average Daily Rate is also up (4.5%).	Occ - 6 Month Historic	55.6%	50.1%	11.0%
	ADR - 6 Month Historic	\$247	\$236	4.5%
d. Future 6 Month On The Books Performance: Current YTD vs. Previous YTD				
Occupancy Rates for the upcoming 6 months (September - February) are up (38.2%) compared to the same period last year, while Average Daily Rate is down (-9.8%).	Occ % - 6 Month Future	23.6%	17.1%	38.2%
	ADR - 6 Month Future	\$204	\$226	-9.8%
e. Incremental Pacing - % Change in Rooms Booked last Calendar Month: Aug. 31, 2016 vs. Previous Year				
Rooms Booked during last month (August, 2016) compared to Rooms Booked during the same period last year (August, 2015) for all arrival dates are up by (61.6%)	Booking Pace (August):	5.6%	3.5%	61.6%

LOOKING FORWARD We are entering the traditional "shoulder" of the summer season on an economic high-note, with consumer and financial markets in good condition despite many external, and some internal, downward forces. The domestic financial market roll of recent months is clearly sustainable based on their performance through the Brexit vote as well as the China downturn, and employers seem committed to growing the number of jobs at break-neck pace. However, in the months ahead we should be wary of a few factors that may take some momentum out of both markets. Though analysts are now downplaying the possibility, interest rate hikes may be coming from the Federal Reserve. The Presidential election is a contentious one and neither major party candidate is popular overall, so some instability may follow. And, lastly, there remains the impact of the Brexit vote, which will be long-term and negative, though what overall impact it will have against the US domestic strength is hard to say. In the face of it all is the mountain traveler, resilient and committed. Based on the aggregate of DestiMetrics industry-wide data, on-the-books aggregate occupancy for all destinations for the upcoming six months (September - February) is up 11.0 percent, while rate is also up 2.4 percent from the same period last year. Meanwhile, bookings made during August for arrival August - January were up 12.0 percent compared to the same period in 2015. Locally, North Lake Tahoe on-the-books occupancy for September 2016 is up 13.1 percent compared to 2015, accompanied by an increase in rate of 3.5 percent. Occupancy on-the-books for the upcoming six months (September - February) is up 38.2 percent compared to the same period last year, with a decrease in rate of -9.8 percent. North Lake Tahoe bookings taken in August for arrival August- January were up 61.6 percent compared to the same period last year, with gains in three of the six months in scope.

For more information:

North Lake Tahoe Contact Information John Thompson, Director of Tourism

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www.nltra.org

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Accounts Receivable Summary

Invoices With Apply Dates Through September 27, 2016
Aged as of Tuesday, September 27, 2016

Revenue Item	(Double click to drill down)	Not Yet Due	Current	31 - 60	61 - 90	91 - 120	121+	Total
Activities		0.00	0.00	0.00	0.00	0.00	290.00	290.00
Dues		0.00	3,020.00	1,105.00	1,855.00	2,450.00	11,425.00	19,855.00
Email Blast		0.00	0.00	75.00	225.00	0.00	20.00	320.00
Sponsorships		0.00	0.00	500.00	0.00	0.00	0.00	500.00
TMBC		0.00	0.00	0.00	15.00	0.00	0.00	15.00
Tourism Summit		0.00	25.00	0.00	0.00	0.00	0.00	25.00
Total Open Invoices		0.00	3,045.00	1,680.00	2,095.00	2,450.00	11,735.00	21,005.00
Unapplied Payments With Payment Dates Prior to and Including 09/27/2016								
								5.00

Pre-Payments: Payments Made Prior to 09/27/2016 on Invoices With Apply Dates After 09/27/2016

Total Pre-Payments

Net Accounts Receivable (Open Invoices Less Unapplied Payments Less Pre-Payments)

21,000.00

Chamber Calendar 2016-Looking Ahead

October 4-**Breakfast Club Meet the Candidates** -Granlibakken Tahoe, Tahoe City-7:00am-8:30am, \$15

October 13-**Chamber Mixer**-Incline Village Hospital-Halloween Theme 5:00pm-7:00pm

October 21-**Annual Membership Luncheon**-North Tahoe Event Center, Kings Beach-11:30am

October 26-**Ambassadors Meeting**-Location TBD-12:00pm

November 1-**Breakfast Club** -Granlibakken Tahoe, Tahoe City-7:00am-8:30am, \$15

November 10-**Chamber Mixer**-UC Davis TERC & Sierra Nevada College-Incline Village 5:00pm-7:00pm

November 17-**Chamber Mixer**-Joint with Truckee chamber 5:00-7:00pm

November 30-**Ambassadors Meeting**-Location TBD-12:00pm

December 6-**Breakfast Club**-Granlibakken Tahoe, Tahoe City-7:00am-8:30am, \$15

December 9-**Chamber Mixer**-Sunnyside Toys for Tots-5:00pm-7:00pm

December 15-Winter Rec Après Ski Event

February 1-3- **W.A.C.E. Annual Conference**-Los Angeles

February 26, 2017-**North Lake Tahoe Bridal Faire**-Squaw Valley-11:00am-3:00pm



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October 5, 2016

Subject: Updates: Call for Projects Process and Transportation Investment Plan (Measure M)

From: Ron Treabess, Director of Community Partnerships and Planning

Staff Request:

- This is an informational item only and no Board action is necessary.

Call for Projects Process:

- Four Requests for Maintenance Funding were reviewed and recommended by the CI/T Committee at its September 26th meeting.
 - Winter snow removal on Squaw Valley Multi-purpose Trail (\$70,000)
 - Winter snow removal on Tahoe City area Multi-purpose Trails (\$55,000)
 - Tahoe City Gateway Holiday Lighting Repairs (\$10,000)
 - Truckee River Trail Midway Erosion Maintenance Repair (\$15,000)
- The total requests are for up to \$150,000 for which \$180,000 is approved and undesignated in the current budget.
- These recommended requests will come to the NLTRA Board on November 2nd.
- Staff has received 17 new TOT funding requests for a total of \$1,829,742.
- The amount of funding available as of July 1, 2017 for new requests is \$1,519,458.
- Staff is reviewing the applications with the applicants to be followed with presentations to the CI/T Committee on October 24th.
- Recommendations will be presented to NLTRA Board at its December 7th meeting.
- The new project application request list is attached.

Transportation Investment Plan (Measure M)

- Staff, along with TNT/TMA Staff, and some participation from representatives of the YES on M Committee have been making educational presentations to various organizations. (List Attached)
- We will continue these question and answer presentations through October.
- The September 14th Annual Transit Summit focused heavily on this item.



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New applications for 16/17—Funding available July 1st, 2017

• Roundabout Art	\$75,000	Tahoe Arts
• New Historic Ski Lodge	\$194,197	Tahoe XCountry
• Olympic Museum Planning	\$125,000	Squaw Valley Museum Foundation
• Martis Valley Trail	\$250,000	NCSD
• Mountain Bike Trail Connection	\$39,500	Truckee Trails
• Mountain Bike Trail Wayfinding	\$14,092	Tahoe Area Mountain Biking Association
• Bike and Transit User Software	\$30,000	TNT/TMA
• Maritime Museum Campus Plan	\$125,000	Tahoe Maritime Museum Foundation
• Bike Software for Visitor Display	\$27,700	Tahoe Environmental Research Center
• Donner Summit Visitor Kiosk	\$53,000	Donner Summit Legacy
• Directional Exit Sign	\$65,000	Trimont Land Co.(DBA Northstar California)
• Northstar Water Fill Bottle Stat,	\$73,610	Trimont Land Co. (DBA Northstar California)
• Programmable Message Boards	\$72,643	Trimont Land Co.(DBA Northstar California)
• Emigrant Trail	\$250,000	Placer County DPWF
• Kings Beach Roundabout 267	\$100,000	Placer County DPWF
• Northstar Bus Shelter	\$60,000	Placer County DPWF
• Speedboat Beach Plan Dev.	<u>\$275,000</u>	Placer County DPWF
\$1,829,742 TOTAL		

2016-17 Available Project Funding		Total	Maintenance Reserve
16-17	Starting Funds from 2015-16	\$4,260,134	\$184,742
16-17	Proposed Contract C.I. TOT Funds	\$1,865,549	
16-17	Proposed Contract Transportation TOT Funds	\$1,575,750	
16-17	*Fund Balance Carryover	\$2,531,496	
16-17	Approved Contract C.I. Potential Invoices 16-17	(\$3,002,180)	
16-17	Approved Contract Trans. Probable Invoices	(\$1,575,750)	
16-17	Potential C.I. Projects Requiring Application	(\$100,000)	(\$130,000)
16-17	C.I. Reserve for Previously Approved Funds	(\$3,421,419)	(\$16,863)
	Undesignated Potential Funding	\$2,133,580	\$37,879

Previous approved Truckee River Trail Year 3 Request -614,122

Total Funding Available for New Requests \$1,519,458

NLTRA Staff

Measure M Presentations Calendar

September 1	TNT/TMA
September 6	Tuesday Morning Breakfast Club
September 7	NLTRA Board
September 14	Transit Summit
September 16	Tahoe City Public Utility District
September 21	North Tahoe Business Assoc.
	Tahoe City Downtown Assoc.
	Northstar Community Services District
September 22	Kiwanis
October 11	North Tahoe Public Utility District
October 18	Rotary
October 25	Squaw Valley Public Utility District
October 26	Tahoe Truckee Airport District



Staff Report for Board

Subject: Organization Structure Update

From: Sandy Evans Hall

Big Picture – Desired Outcomes

- One organization that is a joint Visitor Bureau and Chamber of Commerce
- Responsibilities to include Tourism Development and Community/Economic Development for the greater North Lake Tahoe region
- This organization would be governed by one Board of Directors with strong Committee advisors comprised of active stakeholders for each department
- This organization would also be the advisors to the County on expenditure of TOT for Capital Investments and Transportation amenities and services – either as part of the Chamber of Commerce or the Visitor Bureau
- An agreement for the use of TOT for the purposes of marketing the destination, providing conference and visitor services and developing infrastructure and transportation services would be constructed on a multi-year basis with Placer County
- An agreement to combine TOT for the purpose of marketing the entire North Lake Tahoe destination would be constructed on a multi-year basis with the Incline Village Crystal Bay Visitor Bureau
- Governance of this organization would be made up of community and business leaders who represent key stakeholders and needed expertise
- The branding of this organization to include a potential name change will take place following adoption of all the subcommittee recommendations
- Additional funding will be needed for the Chamber of Commerce, which could be in the form of grants, service contracts, dues investments, increased sponsorships, and program fees
- Potential program growth in the Chamber of Commerce, following growth in funding could be in legislative advocacy, community development programs, business development services, economic development activities, and more
- The Visitor Bureau would be strengthened by growing the long-haul domestic and international visitor segments through increased and competitive funding, air service, and national and international events
- Transportation will be critical to move people around the region and the Transit Vision will be fully implemented
- A complete trail system will provide the recreation that people desire and a human powered way to connect people to the attractions in the area
- Vision – to be the voice of the visitors and businesses making North Lake Tahoe the best place to Live, Work, and Play



Chamber Subcommittee on Organization Structure September 20, 2016

AGENDA

1. Introductions

Present: Erin Casey, Jim Phelan, Adam Wilson, Joy Doyle, Stacie Lyans, Jody Poe, Heather Segale, Alex Mourelatos, Kelli Twomey

Staff: Sandy Evans Hall

2. History – Organization Structure Task Force; Board of Directors – Sandy Evans Hall (Members of Organization Task Force: Joy Doyle, Jim Phelan, Adam Wilson, Erin Casey)

Sandy and the Task Force provided a synopsis of the recommendations that were made in May and then the direction from the NLTRA Board of Directors at their June Planning Retreat. The Board chose the one organization, one board structure for now. Alex brought up the friction in the current organization structure as being in 3 areas: Board Elections, Funding through a membership model that creates competition and conflicts with Business Associations, and Future Funding (see whiteboard notes)

3. Selection of Chair

Alex Mourelatos and Joy Doyle will co-chair

4. Process

- a. Committee Driven
- b. Staff as resource to provide information as requested, keep minutes, schedule meetings
- c. Facilitator – funding – **will identify whether a facilitator is necessary as we move along**
- d. Timeline: complete by April – June 2017 – **Not a hard deadline, but would assist with implementation in the next fiscal year**

5. What information would be important to you?

- **Map of Chamber and Business Associations (TCDA, NTBA, IVBA, WSA)**
- **Missions of Chamber and Business Associations**
- **Membership of Chamber and Business Associations, identify overlap**

6. Next meeting

October 12, 8:30 – 10 a.m.

Whiteboard Notes – Thanks Alex!!

Solution Framework

1. Governance
 - a. Chamber Membership (Broad Geo)
 - b. Elects NLTRA Board
 - c. That recommends use of E. Placer TOT
2. Membership/Funding – Chamber/Business Associations
 - a. Overlapping membership
 - b. Perceive duplicate roles
 - c. Reduced funding/Membership for both
3. Constrained Future
 - a. Energy focused on friction points – use of TOT \$ on Chamber
 - i. Staff
 - ii. Events
 - iii. Marketing
 - b. Not a priority of the Board (TOT focus)
 - c. No long term sustainable funding source

Needed Information

1. Assessment of:
 - a. Overlapping membership
 - b. Rate Structures
 - c. Geo Map
2. Mission Statements and Organization Overview of Business Associations and Chamber
 - a. List of events/programs/services (Joy's Spreadsheet)
3. Chamber and Business Association financials/funding
4. NTBA/TCDA overlap Assessment

Next Agenda

1. Review Assessments
2. Brainstorm Chamber Membership Structures
 - a. Areas for Deep Dives

- i. Organization comparisons
 - ii. Governance
 - iii. Membership
 - iv. Events/Programs/Services
- 3. Third Party Outreach



Organization Structure – Next Steps

Update 9-30

Marketing –Set up: JT Thompson, Sandy Evans Hall

Form Task Force to include:

- Organization Task Force Members: (Andy Chapman, Brett Williams), Marketing Committee members, Staff
- **Members: Eric Brandt, Todd Jackson, DeDe Cordell, Brett Williams, Andy Chapman, JT Thompson, Sandy Evans Hall, Marguerite Sprague, Erin Casey**
- Chair TBD

Direction:

- Review and augment comparative analysis
- Evaluate footprint of Cooperative Partnership, look at expanding to Truckee and South Lake Tahoe or other areas for project specific marketing
- Investigate TBID

Timeline:

- Form Task Force in August
- **First meeting October 25**
- Establish goals, work plan, and timeline
- Report back to Marketing Committee and NLTRA Board regularly

Chamber – Set up: Sandy Evans Hall

Form Task Force to include:

- Organization Task Force Member(s) (Adam Wilson), Business Association EDs, member businesses, other stakeholders, Staff
- **Members: Erin Casey, Alex Mourelatos, Adam Wilson, Jim Phelan, Joy Doyle, Stacie Lyans, Jody Poe, Heather Segale, Kelly Twomey, Ginger Karl, Chris Perry, (request to add restaurant and retail representatives)**

- Co-Chairs are Joy Doyle and Alex Mourelatos
- Facilitator TBD, this was discussed and it was determined that a facilitator is not needed at this time

Direction:

- Identify duplication with Business Associations, what do other comparable destinations do?
- Explore how to strengthen Chamber in programs and funding, possible advocacy role with CI/T
- Look into hiring a facilitator that would be unbiased – seek funding from stakeholders? Possibly fund with Research & Planning (CI/T)
- Conduct a gap analysis via focus groups in each geographic area – what do businesses need or want the Chamber to do for their business
- Create a Chamber Committee tasked with the oversight and direction of programs and resources

Timeline:

- First meeting September 20, 2:00 p.m. NLTRA, Second meeting October 12, 8:30 a.m.
- Currently gathering data from all organizations to include mission, funding, events, membership, benefits to better understand the areas of overlap and gaps where there is no service.

CI/T Committee – Set up: Ron Treabess, Sandy Evans Hall

Form Task Force to Include:

- Staff, Organization Task Force member(s), CI/T Committee Members (Jaime Wright, Will Garner, Erin Casey, Samir Tuma, Mike Staudenmayer – OTF member also)
- Members: Jaime Wright, Mike Staudenmayer, Will Garner, Erin Casey, Cindy Gustafson, Alex Mourelatos, Jim Phelan, Samir Tuma
- Chair: Samir Tuma

Direction:

- Identify pros/cons for switching administration of all projects to the County and what the best level of administration should switch
- Identify any cost or revenue impacts from this action
- What role in administration should remain at the NLTRA
- Prescribe ways to strengthen community voice and role of advocacy

Timeline:

- First meeting August 19, 12:30 p.m., second on September 14 at 8:00 a.m.

- Chair: Samir Tuma
- Identified tasks of administration that might be transferred to County, cost of services from County, cost of services from NLTRA, proposed new scope of work for NLTRA staff
- Final recommendation was agreed upon by subcommittee and County and will be before the Board of Directors on October 5 and will also be incorporated into the Agreement with Placer County to coincide with the fund balance amendment.

Administration – Set up: Erin Casey, Sandy Evans Hall

Form Task Force to include:

- Jennifer Merchant, Erin Casey, David Boesch, Sandy Evans Hall, NLTRA Board Members (Samir Tuma, David Tirman, Adam Wilson), Legal Counsel, Organization Task Force Member(s)
- Chair TBD
- Sandy and Erin to work on initial draft contract
-

Direction:

- Multi-year contract with annual budgets and work plans
- Institutional knowledge to be captured in an appendix- operational agreement
- Use of collaborative language

Timeline:

- Some initial changes will be made with the Fund Balance Amendment in October 2016 to clarify the changes in the CI/T administration in the NLTRA Scope of Work, to clarify the requirement to return all unspent funds or over spent funds in departments, flexing the Capital Investments and Transportation classes; and a revised set of metrics to measure success of the destination marketing program
- Goal is to have complete new contract approved by NLTRA board in June 2017. Some potential changes that have been discussed is to reduce the Scope of Work to a more general document describing services performed by the NLTRA and moving all the specific tasks and KPIs to the NLTRA Work Plan, rewording the punitive language into more of a shared understanding partnership, reviewing the reporting structure and identifying what is meaningful.
- Timing around the contract development may also impact the timing of the strategic planning for the Board, moving that up to March or April to coincide with the budget and Scope of Work development, then finalized in the adoption of the Work Plan and Agreement with Placer County.

Board Governance – Set up: David Tirman, Sandy Evans Hall

Form Task Force to include:

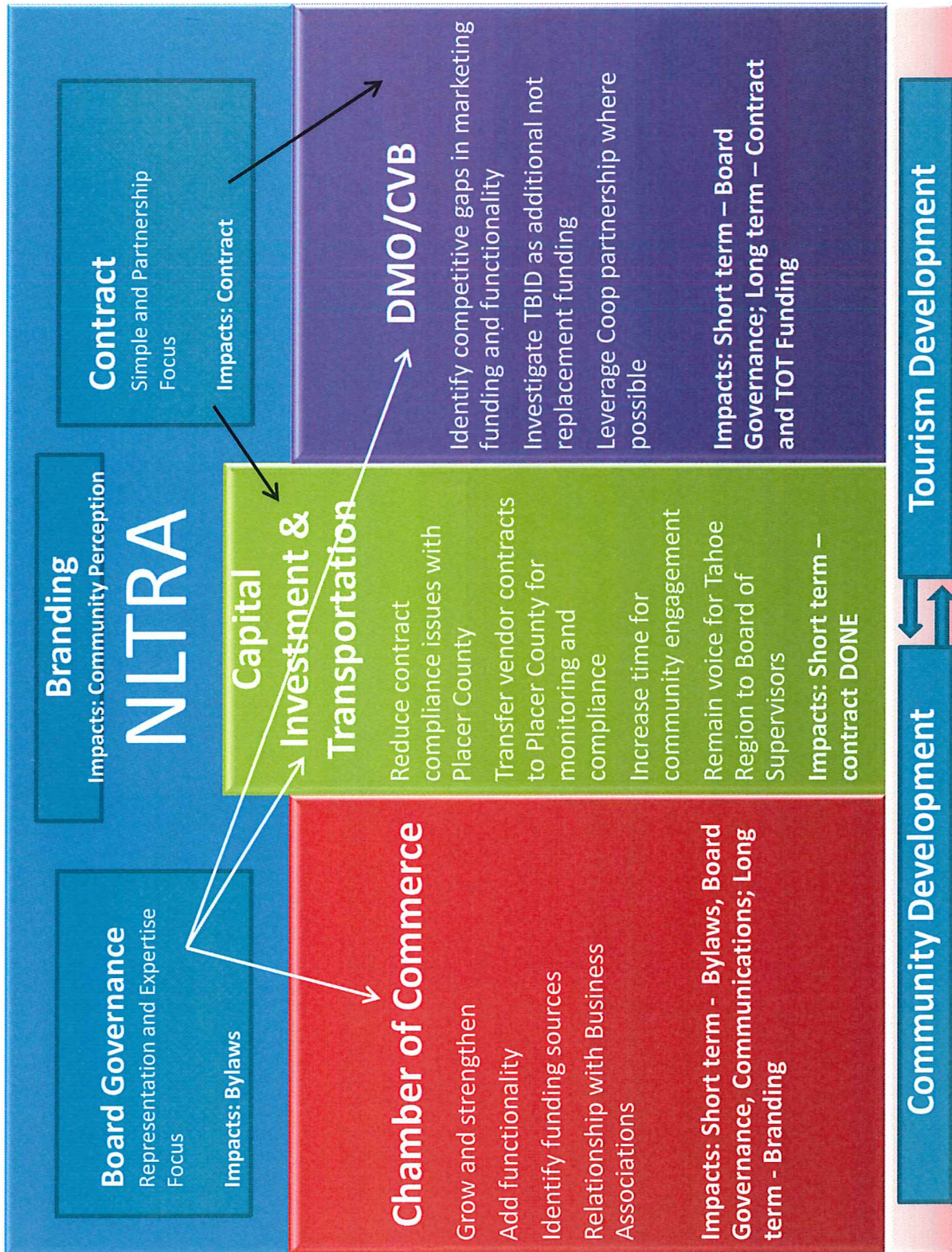
- Board Members (Samir Tuma, David Tirman plus others), Organization Task Force member(s), Staff
- **Members: Keith Vogt, Samir Tuma, David Tirman, Wally Auerbach, Tom Lotshaw, Sandy Evans Hall**
- **Chair: Wally Auerbach**

Direction:

- Determine whether membership votes by ballot or accepts a recommended slate (be sensitive to “good old boy club”) Also could have a portion be appointed members
- Explore how to expand the flexibility of the board
- Determine maximum and minimum number of board members and representation (recommended max. 15)
- Confirm role of County on the Board (recommended elected officials be voting members, staff be ex-officio or advisory)
- Consider factions that might have an appointed or elected seat on the board such as Education and Health Care

Timeline:

- **First Meeting September 12 at 1:00 p.m., Second Meeting October 6 TBD**
- **Bylaws have been sent to all committee members, there will also be some comparative analysis such as 1)How does a larger board function ? What is the frequency of meetings?**
- **Group would like to start from scratch and identify what makes the most sense for the function and operation of the organization**
- **There will be a need to bring this group together with the Chamber Subcommittee to identify any governance input from this group**





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NLTRA Executive Committee

Thursday, August 18, 2016

NLTRA Offices

Agenda

A. Open Session

1. Items for Board Agenda – October 5
 - a. Metrics for measuring success in Marketing
 - b. Amendment to Contract for fund balance – to also include changes to scope of work for Ron Treabess
Sandy mentioned these two items that would be on the agenda for October. In addition to the fund balance, the agreement between Placer County Visitor Bureau and NLTRA for \$40,000 in TOT is also slated to be on the agenda as it is required by County Contract.
2. Strategic Discussion ideas –
 - a. Strategy for increasing Destination Visitor segment of market
 - b. Placer Recreational Facilities Master Plan – Andy Fischer
 - c. Funding alternatives – Trails Development and Maintenance, Destination Visitor Marketing, Transit Vision
 - d. Homewood Development Update
 - e. **Board Governance Education**
The board would like to have a presentation and discussion on Board Governance. This could be a high level discussion which might lead to attendance in the TTCF Workshops that will be offered in October.
3. Financial Reports, Audit, and Budget Update – Al Priester
Al reported that the audit was going well and that there were a couple of items that the auditors were questioning that will need clarification in the agreement with Placer County in regards to what needs to be repaid from TOT. The agreement is interpreted by the County to have any unused funds by department returned as well as any amount over spent. The overspending would have to come from the NLTRA's net equity or unrestricted net assets.
4. October 1 – Annual Report due to County: Annual marketing performance indicators, Conference Sales and Equity Analysis, Special Event Grant ROI Analysis, Capital Improvement Project Report. Also Agreement between PCVB and NLTRA for \$40,000. **Sandy shared that these reports were in the works and staff agreed that they would be ready to submit by Friday September 30.**

5. Staff Update – Events and Communication Manager, Membership Sales and Services Manager, Engagement Survey September 20 – 26
 - a. Email from Steve Gross

Steve Gross drafted an email to go to Ms. Karl regarding a cease and desist from using all forms of communication owned by NLTRA. Sandy explained that the use of these channels has stopped and the members of the Exec. Committee voiced a need to send the legal notice anyway once it was revised by Sandy to reflect the current situation.

There was discussion regarding the job description for the Membership position and Sandy agreed to add grant writing as a preferable skill. JT announced that Amber Burke from Northstar would be joining the NLTRA staff on October 17 as the new Events and Communications Manager.

6. Organization Structure Next Steps
 - a. CI/T group met August 19 and September 14 – final recommendations will be to Board on October 5
 - b. Marketing group members selected – group to meet in September TBD
 - c. Board group met September 12
 - d. Contract – Erin and Sandy working on
 - e. Chamber group meeting September 20

Sandy reported on the schedule of organization structure meetings. There was a request to inform the whole board on the integration of all the meetings into an overall organization change. Sandy will attempt to provide a bigger picture view at the upcoming board meeting if there is time.
7. Strategic Goals Revision and Work Plan Presentation to Board of Supervisors

Sandy shared a revised powerpoint presentation for the County Board of Supervisors. Some thought that it was very text heavy and Sandy explained that this was per the request of the CEO staff. She will see if it might be possible to transfer some of the text to Notes which could still be available for the BOS to read prior to the meeting and then she could remove the large amount of text from the slide so that it would be more legible during the presentation.
8. Measure M Update

There are a variety of meetings taking place to educate the public in the Tahoe region on the benefits of the proposed sales tax. Business Associations, Utility or Service Districts, Service Clubs and any other group that requests it is getting a presentation from Ron Treabess, Jaime Wright or Sandy Evans Hall. Usually there is also someone from the campaign advocacy team at the meetings to advocate for the vote.
9. Election process – December 6 is Election day, 45 days prior is October 21 for Notice of Election. Filing deadline is October 31. Need to appoint an election committee on October 5 to begin working on recruitment of potential board members with at least one board member:
 - a. Wally Auerbach – General
 - b. Valli Murnane – Recreation
 - c. David Tirman – Small Lodging

Sandy will gather an election committee and the Board will appoint a volunteer as well at the upcoming Board meeting. Sandy will check with Valli to see if she wants to remain a board member and both David and Wally confirmed that they would be leaving the board in December.

10. Upcoming Events:

- a. September 23 – Tourism Summit
- b. October 21 – Membership Luncheon

11. Other business



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October 5, 2016

Subject: Monthly Activity Report—September, 2016
From: Ron Treabess, Director of Community Partnerships and Planning

A. Capital Investment/Transportation Work Plan Projects—Update

Pertinent status and updates will be provided at the meeting, if appropriate, and may include:

- 2016 Transportation Summit
- Homewood Bike Trail
- Fanny Bridge/64 Acres Project
- Ice Skating Rink Project

B. Other Meetings and Activities Attended

- Tuesday Morning Breakfast Club
- TMA Board Meeting
- LAFCo Board Meeting
- Tahoe Transportation District Board
- NLTRA Finance Committee Meeting
- TRPA/APC Meeting—North Tahoe Area Plan
- Ice Skating Rink Funding Meeting
- CI/T Committee Meeting
- Kings Beach Pier Concept Plan Review
- Annual Transit Summit
- TCDA Measure M
- Northstar Community Service District

KEY IMPACT METRICS
as of December 31, 2012

Conference Revenue And Percentage by County:

Conference Revenue Statistics Fiscal	July 1, 20XX to June 30, 20XX	2013-14	2014-15	2015-16	2016-17	2013-14 %	2014-15 %	2015-16 %	2016-17 %
FORWARD LOOKING (2015/16)									
Total Revenue Booked as of 6/30/XX		\$ 2,807,318	\$ 3,044,650	\$ 2,988,637	\$ 2,919,448				
Forecasted Commission for this Revenue		151,069	159,383	157,984	132,119				
Number of Room Nights		15,289	16,944	15,588	20,897				
Number of Tentative Bookings		96	95	59	57				
CURRENT									
Annual Revenue Goal		\$ 2,750,000	\$ 2,500,000	\$ 2,800,000	\$ 2,800,000				
Annual Commission Goal		\$ 160,000	\$ 170,000	\$ 175,000	\$ 135,000				
Conference Revenue And Percentage by County:									
Placer		\$ 1,981,316	\$ 2,024,746	\$ 2,236,321	\$ 2,156,096	70.6%	66.5%	74.8%	73.9%
Washoe		\$ 266,099	\$ 139,002	\$ 650,054	\$ 477,504	9.5%	24.2%	21.8%	16.4%
South Lake		\$ 462,174	\$ 737,080	\$ 79,945	\$ 283,848	16.5%	4.7%	2.7%	9.7%
Nevada		\$ 97,729	\$ 143,822	\$ 22,317	\$ 2,000	3.5%	100.0%	0.7%	0.1%
Total Conference Revenue		\$ 2,807,318	\$ 3,044,650	\$ 2,988,637	\$ 2,919,448	100.0%	100.0%	100.0%	100.0%

15/16
Jul-16
\$1,844,586
\$496,281
\$80,695
\$39,240
\$2,460,802

Infrastructure Fund Balances Held by Placer County as of	6/30/2015
Contract 12945 2010-11	\$ -
Contract 13054 2011-12	\$ -
Contract 13235 2012-13	\$ -
Contract 13325 2013-14	\$ -
Contract 13452 2014-15	\$ 853,962
Contract 13452 2015-16	\$ 2,020,242
Total Fund Balances	\$ 2,874,204

Calendar	2010	2011	2012	2013	2014	2015
Q1	592,861	469,504	505,344	724,645	589,226	582,694
Q2	376,497	391,536	446,802	488,100	521,965	498,918
Q3	687,963	757,531	777,413	860,783	885,368	881,698
Q4	448,294	441,061	529,470	481,165	557,614	0
	\$ 2,105,615	2,059,632	2,259,029	2,554,693	2,554,173	1,963,310
FY 10-11						FY 15-16
Q1	687,963	757,531	777,413	860,783	885,368	875,768
Q2	448,294	441,061	529,470	481,165	557,614	596,985
Q3	469,504	505,344	724,645	589,226	573,778	
Q4	391,536	446,802	488,100	521,965	495,699	

6/30/2015

Archives Only (not updated):

Destimetrics Reservations Activity	6/30/2015	FYTD 14/15
Occupancy	0.611	217
ADR (Average Daily Rate)	217	133
RevPAR (Rev per Available Room)	133	0.613
Occupancy 1 Mth Forecast	0.613	283
ADR 1 Mth Forecast (Average Daily Rate)	283	173
RevPAR 1 Mth Forecast (Rev per Avail. Rm)	173	0.443
Occupancy (prior 6 months)	0.443	229
ADR (prior 6 months)	229	101
RevPAR (prior 6 months)	101	0.271
Occupancy (next 6 months)	0.271	260
ADR (next 6 months)	260	70
RevPAR (next 6 months)	70	

15/16

Total TOT Collections by Quarter	2008	2009	2010	2011	2012	2013	2014	2015
Quarter 1	\$ 3,266,869	\$ 1,478,424	\$ 2,743,430	\$ 1,163,143	\$ 8,651,866	\$ 4,720,989	\$ 3,873,789	\$ 4,869,184
Quarter 2	\$ 2,815,626	\$ 1,633,431	\$ 3,605,526	\$ 1,190,129	\$ 9,244,712	\$ 3,752,173	\$ 5,245,702	\$ 3,873,789
Quarter 3	\$ 3,242,663	\$ 2,107,554	\$ 3,776,990	\$ 1,361,343	\$ 10,488,550	\$ 5,245,702	\$ 1,528,817	\$ 1,652,577
Quarter 4	\$ 3,683,345	\$ 1,794,633	\$ 3,159,674	\$ 1,554,224	\$ 10,191,876	\$ 15,247,681		
2008-09	\$ 3,882,502	\$ 2,102,622	\$ 4,263,450	\$ 1,440,039	\$ 11,688,613			
2009-10	\$ 4,523,469	\$ 2,145,525	\$ 3,560,896	\$ 1,738,719	\$ 11,968,609			
2010-11	\$ 21,414,474	\$ 11,262,189	\$ 21,109,966	\$ 8,447,597	\$ 53,582,360			
2011-12								
2012-13								
2013-14								
Total								

TOT Summary
4,869,184
3,873,789
5,245,702
1,528,817
15,247,681

Calendar Year Sales Tax Revenue - Tahoe(Calendar Year Basis)	2007	2008	2009	2010	2011	2012	2013	12. v 13	YOY % Change
Quarter									
First (JFM)	\$ 575,721	\$ 643,647	\$ 521,787	\$ 592,861	\$ 469,504	\$ 505,344	\$ 724,645	\$ 43,40%	
Second (AMJ)	\$ 528,029	\$ 486,809	\$ 400,212	\$ 376,497	\$ 391,536	\$ 446,802	\$ 488,100	\$ 9,24%	
Third (JAS)	\$ 792,879	\$ 791,449	\$ 612,761	\$ 687,963	\$ 757,531	\$ 777,413	\$ 860,783	\$ 10,72%	
Fourth (OND)	\$ 514,299	\$ 431,607	\$ 428,368	\$ 448,294	\$ 441,061	\$ 529,470	\$ 538,112	\$ 1,63%	
Total	\$ 2,410,928	\$ 2,353,512	\$ 1,963,128	\$ 2,105,615	\$ 2,059,632	\$ 2,259,029	\$ 2,611,640		

KEY METRICS FOR AUGUST 30, 2017 FINANCIAL STATEMENTS

Total District 5 TOT Collections by Quarter 2010 - 2016 (as reported thru July 2016)					
	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
2009-10	\$ 2,815,626	\$ 1,633,431	\$ 3,605,526	\$ 1,190,129	\$ 9,244,712
2010-11	\$ 3,242,663	\$ 2,107,554	\$ 3,776,990	\$ 1,361,343	\$ 10,488,550
2011-12	\$ 3,683,345	\$ 1,794,633	\$ 3,159,674	\$ 1,554,224	\$ 10,191,876
2012-13	\$ 3,882,952	\$ 2,103,118	\$ 4,263,868	\$ 1,444,425	\$ 11,694,363
2013-14	\$ 4,401,526	\$ 2,048,674	\$ 3,494,493	\$ 1,637,062	\$ 11,581,755
2014-15	\$ 4,560,082	\$ 2,414,779	\$ 3,428,463	\$ 1,741,213	\$ 12,144,537
2015-16	\$ 4,869,184	\$ 3,873,789	\$ 5,359,469	\$ 1,652,577	\$ 15,755,019

Visitor Information Comparative Statistics For Fiscal YTD 2013 - 2017 (thru Aug '16)					
Referrals -	2013/2014	2014/2015	2015/2016	2016/2017	YOY % Change
Tahoe City:					
Walk In/Events	14,404	16,155	14,866	16,569	11.46%
Phone/Email	881	714	713	824	15.57%
Kings Beach (Walk In Only)	4,560	2,739	3,746	2,908	-22.37%
Totals	19,845	19,608	19,325	20,301	5.05%

Sales Tax Revenue by Fiscal Year Quarter - North Lake Tahoe (as of June 2016, 6 mth lag)					
Quarter	2012/13	2013/14	2014/15	2015/16	YOY % Change
First	\$ 724,645	\$ 860,783	\$ 885,368	\$ 875,768	-1.08%
Second	\$ 529,470	\$ 481,165	\$ 557,614	\$ 596,985	7.06%
Third	\$ 724,645	\$ 589,226	\$ 573,778		
Fourth	\$ 488,100	\$ 521,965	\$ 495,699		
Total	\$ 2,466,860	\$ 2,453,139	\$ 2,512,459	\$ 1,472,753	

EDD

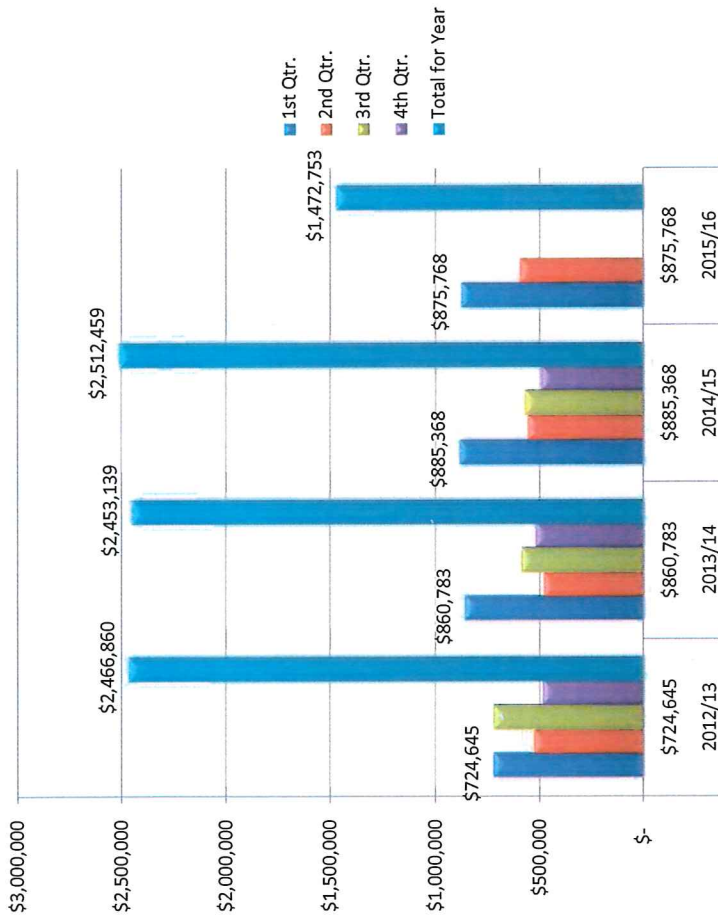
Unemployment Rates	June 2014	July 2015	June 2016	Aug 2016
California (pop. 38,332,521)	7.1%	6.7%	5.4%	5.5%
Placer County (367,309)	6.0%	5.2%	4.8%	4.7%
Dollar Point (1,215)	7.1%	6.1%	1.1%	1.1%
Kings Beach (3,893)	6.0%	6.8%	6.3%	6.1%
Sunnyside/Tahoe City (1,557)	7.0%	5.7%	5.3%	5.1%
Tahoe Vista (1,433)	10.1%	8.9%	4.4%	4.3%

Destimetrics Reservations Activity				
	FYTD 15/16	FYTD 16/17	Change	
Occupancy	66.7%	67.7%	1.4%	
ADR (Average Daily Rate)	\$ 278	\$ 267	-4.0%	
RevPAR (Rev per Available Room)	\$ 186	\$ 181	-2.6%	
Occupancy 1 Mth Forecast	48.8%	55.2%	13.1%	
ADR 1 Mth Forecast	\$ 218	\$ 225	3.5%	
RevPAR 1 Mth Forecast	\$ 106	\$ 124	17.0%	
Occupancy (prior 6 months)	50.1%	55.6%	11.0%	
ADR (prior 6 months)	\$ 236	\$ 247	4.5%	
RevPAR (prior 6 months)	\$ 118	\$ 137	16.0%	
Occupancy (next 6 months)	17.1%	23.6%	38.2%	
ADR (next 6 months)	\$ 226	\$ 204	-9.8%	
RevPAR (next 6 months)	\$ 39	\$ 48	24.7%	

Infrastructure Fund Balances Held by Placer County as of 6/30/16 (Reported Quarterly)			Total Chamber Membership
FY 2013-14 Contract	\$ -	June 2013	465
FY 2014-15 Contract	\$ 1,121,770	June 2014	457
FY 2015-16 Contract	\$ 3,138,364	June 2015	474
Total Fund Balances	\$ 4,260,134	June 2016	508
		Aug 2016	487

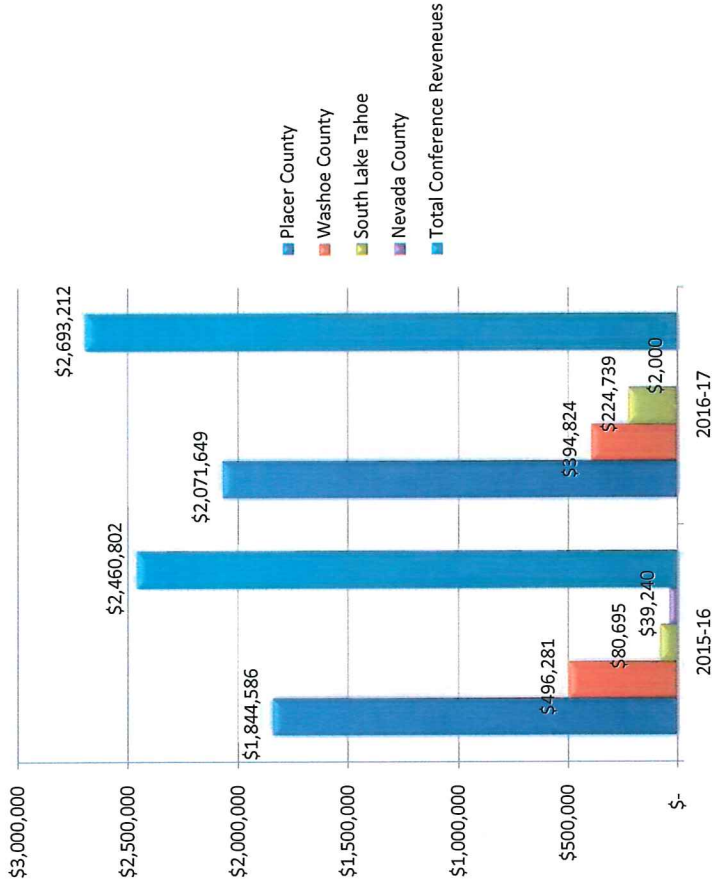
Conference Revenue Statistics Comparison FYTD 15/16 vs. FYTD 16/17				
	2015-16 Actuals	2016-17 Forecasted	YOY % Change	
FORWARD LOOKING (2015/16)				
Total Revenue Booked	\$ 2,988,637	\$ 2,919,448	-2.32%	
Forecasted Commission for this Revenue	157,984	132,119	-16.37%	
Number of Room Nights	15,588	20,897	34.06%	
Number of Tentative Bookings	59	57	-3.39%	
CURRENT				
NLT - Annual Revenue Goal	\$ 2,800,000	\$ 2,800,000	0.00%	
Annual Commission Goal	\$ 175,000	\$ 135,000	-22.86%	
Conference Revenue And Percentage by County:				
	15-16	16-17		
Placer	75%	77%	\$ 1,844,586	\$ 2,071,649
Washoe	20%	15%	\$ 496,281	\$ 394,824
South Lake	3%	8%	\$ 80,695	\$ 224,739
Nevada	2%	0%	\$ 39,240	\$ 2,000
Total Conference Revenue	100%	100%	\$ 2,460,802	\$ 2,693,212
				9.44%

Annual Sales Tax Revenue - Lake Tahoe (Now on Fiscal Year Basis)



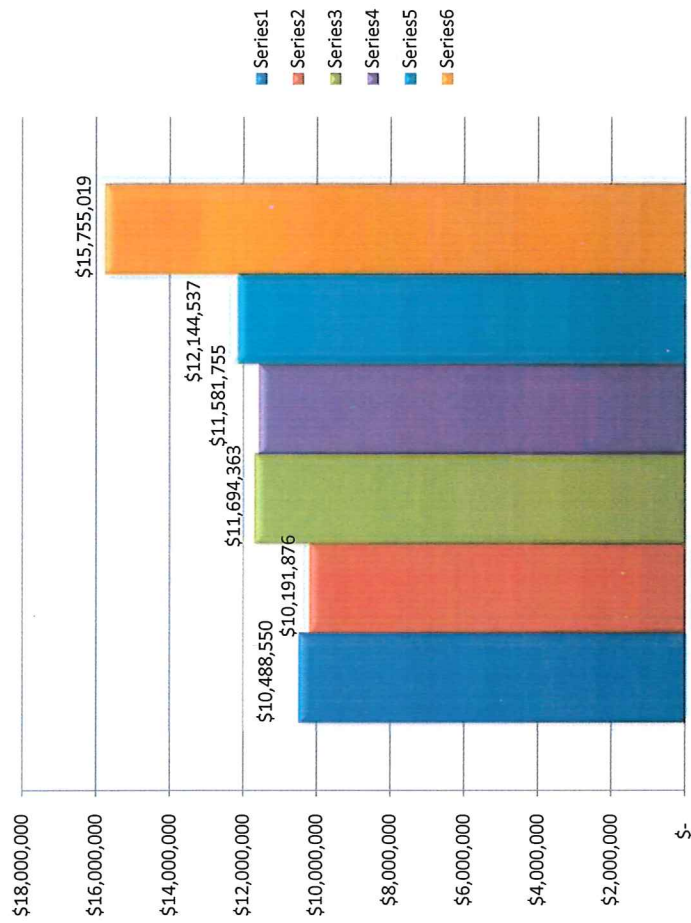
Sales Tax Revenue by Fiscal Year Quarter - North Lake Tahoe (as of June 2016, 6 mth lag)					
Quarter	2012/13	2013/14	2014/15	2015/16	YOY % Change
First	\$ 724,645	\$ 860,783	\$ 885,368	\$ 875,768	-1.1%
Second	\$ 529,470	\$ 481,165	\$ 557,614	\$ 596,985	7.1%
Third	\$ 724,645	\$ 589,226	\$ 573,778	-	
Fourth	\$ 488,100	\$ 521,965	\$ 495,699	-	
Total	\$ 2,466,860	\$ 2,453,139	\$ 2,512,459	\$ 1,472,753	-41.4%

Conference Revenue Statistics & Revenue Share by County

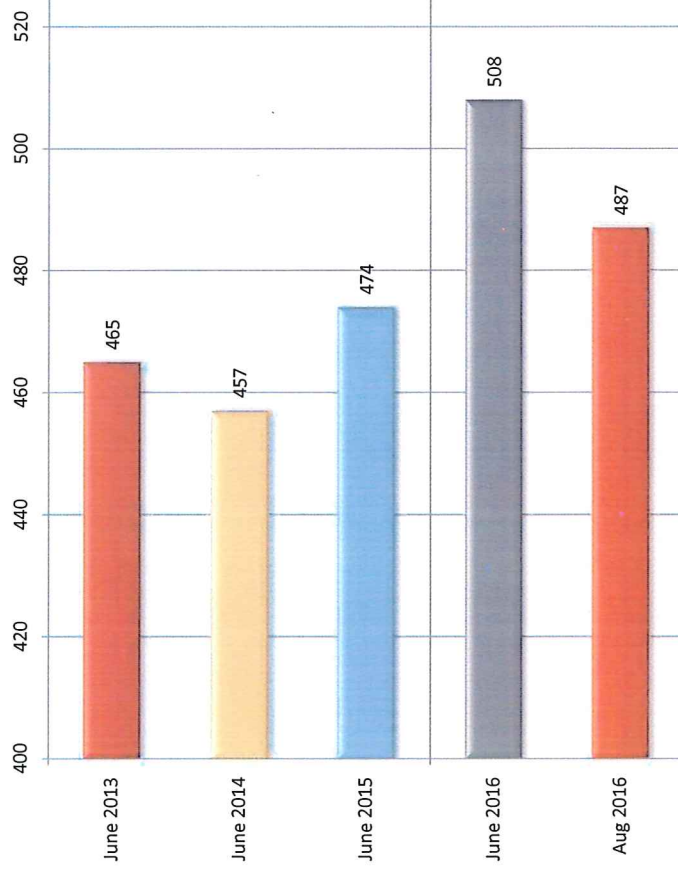


Conference Revenue Statistics Comparison FYTD 15/16 vs. FYTD 16/17				
	2015-16	2016-17	Forecasted	YOY % Change
FORWARD LOOKING (2015/16)				
Total Revenue Booked	\$ 2,988,637	\$ 2,919,448		-2.32%
Forecasted Commission for this Revenue	157,984	132,119		-16.37%
Number of Room Nights	15,588	20,897		34.06%
Number of Tentative Bookings	59	57		-3.39%
CURRENT				
NLT - Annual Revenue Goal	\$ 2,800,000	\$ 2,800,000		0.00%
Annual Commission Goal	\$ 175,000	\$ 135,000		-22.86%
Conference Revenue And Percentage by County:				
Placer	\$ 1,844,586	\$ 2,071,649		12.31%
Washoe	\$ 496,281	\$ 394,824		-20.44%
South Lake	\$ 80,695	\$ 224,739		178.50%
Nevada	\$ 39,240	\$ 2,000		-94.90%
Total Conference Revenue	\$ 2,460,802	\$ 2,693,212		9.44%

5-Year Annual TOT Collections (Fiscal Year Basis)



Chamber Membership (# of Members)



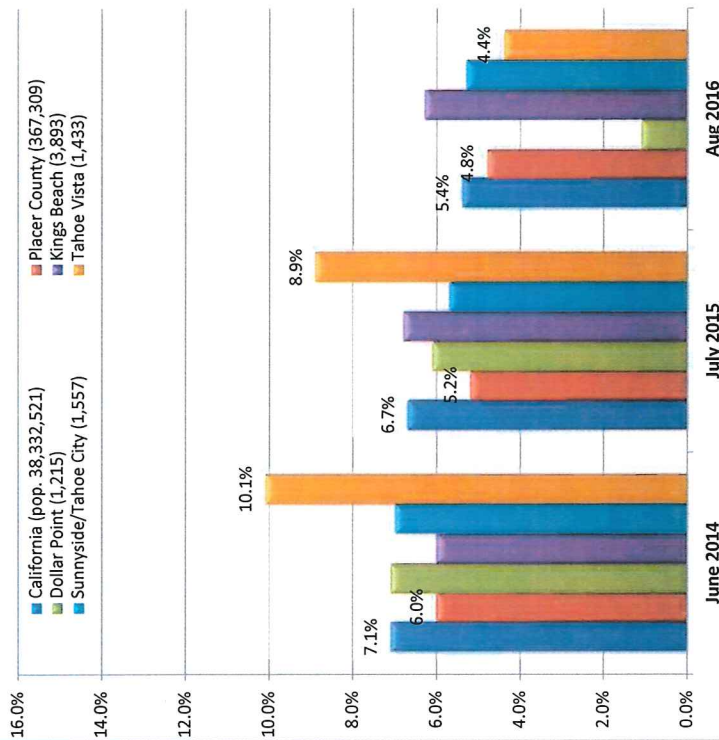
Total District 5 TOT Collections by Quarter 2010 - 2016 (as reported thru July 2016)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
2010-11	\$ 3,242,663	\$ 2,107,554	\$ 3,776,990	\$ 1,361,343	\$ 10,488,550
2011-12	\$ 3,683,345	\$ 1,794,633	\$ 3,159,674	\$ 1,554,224	\$ 10,191,876
2012-13	\$ 3,882,952	\$ 2,103,118	\$ 4,263,868	\$ 1,444,425	\$ 11,694,363
2013-14	\$ 4,525,634	\$ 2,145,657	\$ 3,566,603	\$ 1,745,102	\$ 11,581,755
2014-15	\$ 4,690,454	\$ 2,527,484	\$ 3,462,341	\$ 1,838,955	\$ 12,144,537
2015-16	\$ 4,869,184	\$ 3,873,789	\$ 5,359,469	\$ 1,652,577	\$ 15,755,019

Chamber Of Commerce Total Membership

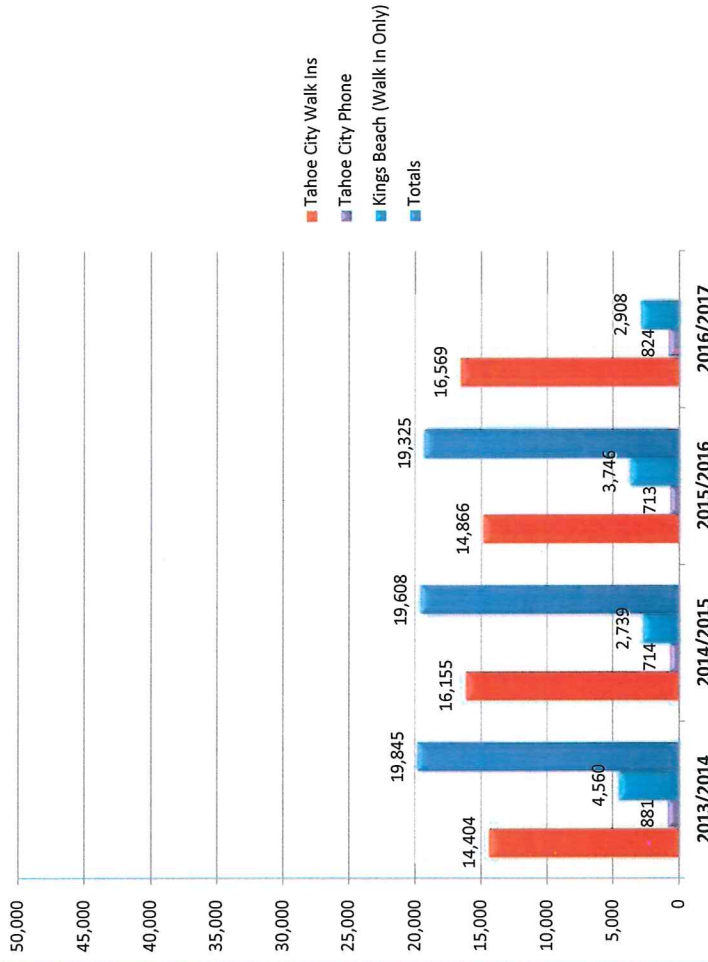
June 2013	465
June 2014	457
June 2015	474
June 2016	508
Aug 2016	487

Unemployment Rates by Region



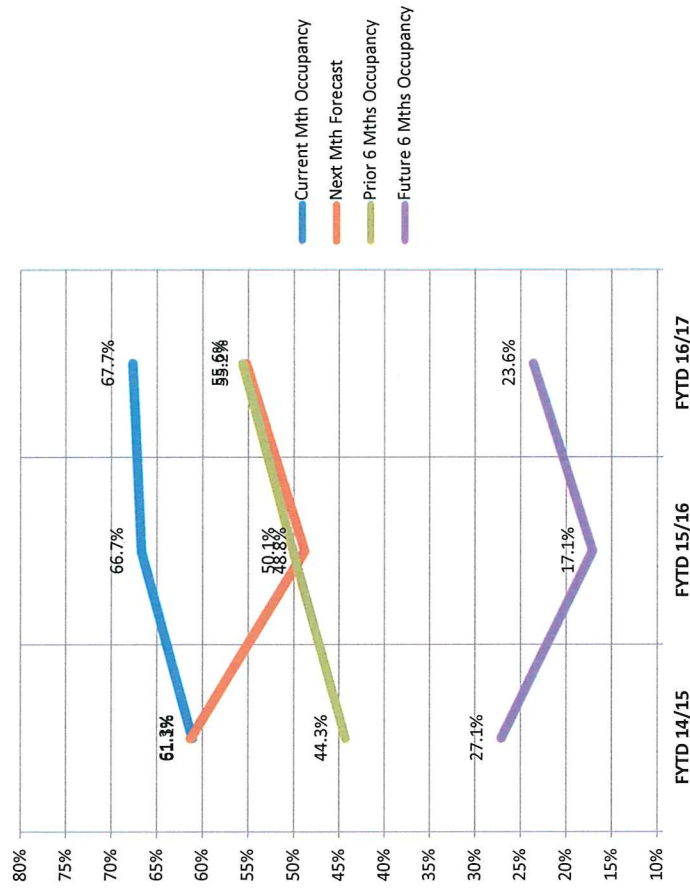
Unemployment Rates		December 2013	June 2014	July 2015	Aug 2016
California		7.1%	6.7%	5.4%	5.5%
Placer County		6.0%	5.2%	4.8%	4.7%
Dollar Point		7.1%	6.1%	1.1%	1.1%
Kings Beach		6.0%	6.8%	6.3%	6.1%
Sunnyside/Tahoe City		7.0%	5.7%	5.3%	5.1%
Tahoe Vista		10.1%	8.9%	4.4%	4.3%

Visitor Information - FYTD YOY



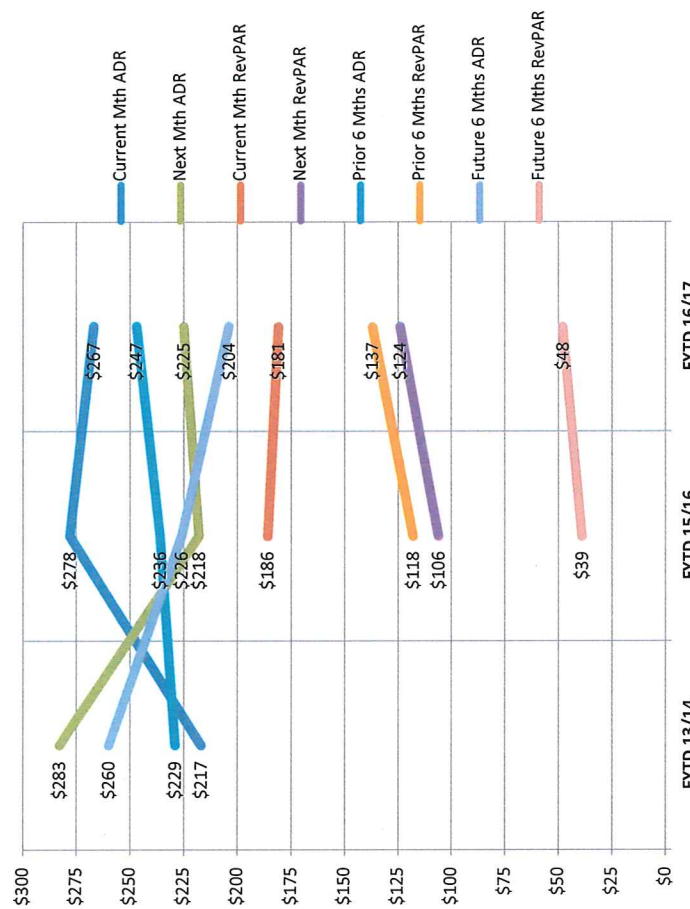
Visitor Information Comparative Statistics For Fiscal YTD 2013 - 2017 (thru Aug '16)							
Referrals -	2013/2014		2014/2015		2015/2016		YOY % Change
	Annual Totals	Annual Totals	Annual Totals	Annual Totals	Annual Totals	Annual Totals	
Tahoe City:							
Walk In	14,404	16,155	14,866	16,569	14,866	16,569	11.46%
Phone	881	714	713	824	713	824	15.57%
Kings Beach (Walk In Only, Jun-Sep)	4,560	2,739	3,746	2,908	3,746	2,908	-22.37%
Totals	19,845	19,608	19,325	20,301	19,325	20,301	5.05%

Destimetrics Occupancy in NLT Comparisons



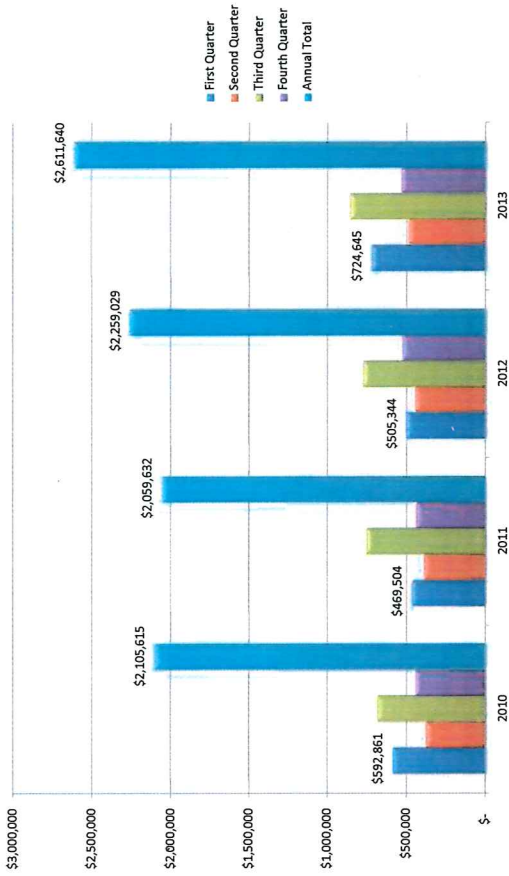
Destimetrics Reservations Activity	FYTD 14/15	FYTD 15/16	FYTD 16/17	Y-O-Y Change
Occupancy	61.1%	66.7%	67.7%	1.4%
Occupancy 1 Mth Forecast	61.3%	48.8%	55.2%	13.1%
Occupancy (prior 6 months)	44.3%	50.1%	55.6%	11.0%
Occupancy (next 6 months)	27.1%	17.1%	23.6%	38.2%

Destimetrics RevPAR in NLT Comparisons

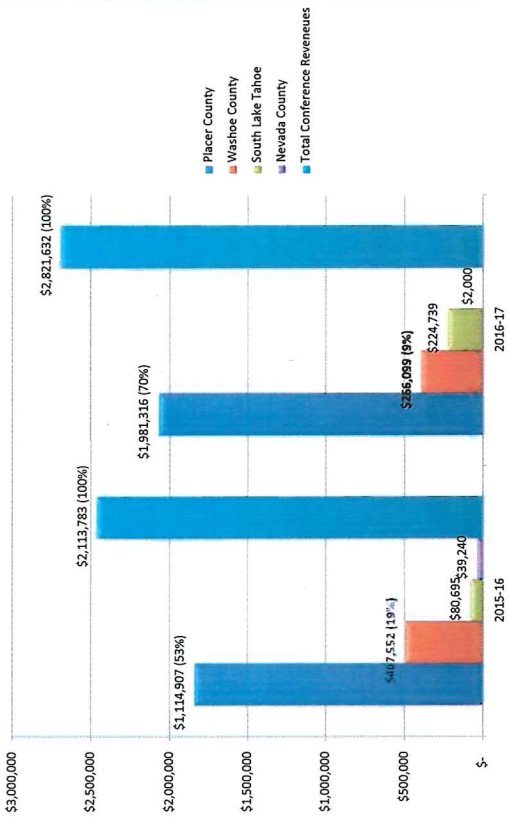


Destimetrics Reservations Activity	FYTD 13/14	FYTD 15/16	FYTD 16/17	Y-O-Y Change
ADR (Average Daily Rate)	\$217	\$278	\$267	-4.0%
RevPAR (Rev per Available Room)	\$283	\$186	\$181	-2.6%
ADR 1 Mth Forecast	\$229	\$218	\$225	3.5%
RevPAR 1 Mth Forecast	\$229	\$106	\$124	17.0%
ADR (prior 6 months)	\$260	\$236	\$247	4.5%
RevPAR (prior 6 months)	\$260	\$118	\$137	16.0%
ADR (next 6 months)	\$260	\$226	\$204	-9.8%
RevPAR (next 6 months)	\$260	\$39	\$48	24.7%

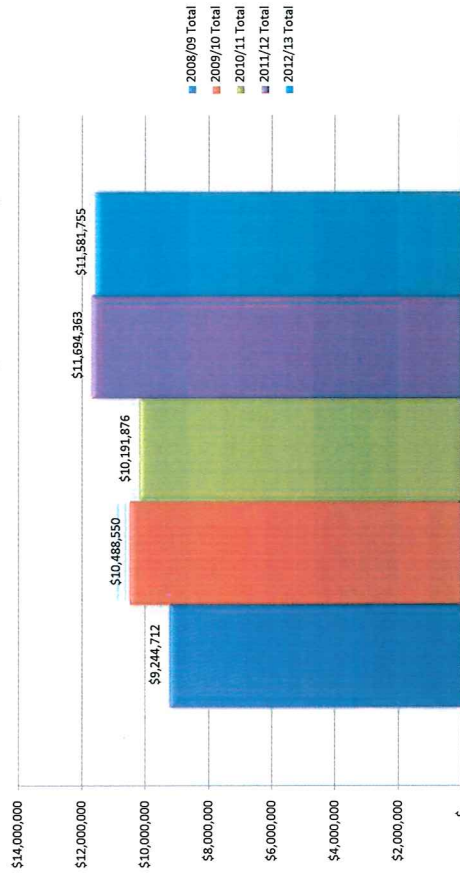
Annual Sales Tax Revenue - Lake Tahoe (Calendar Year Basis)



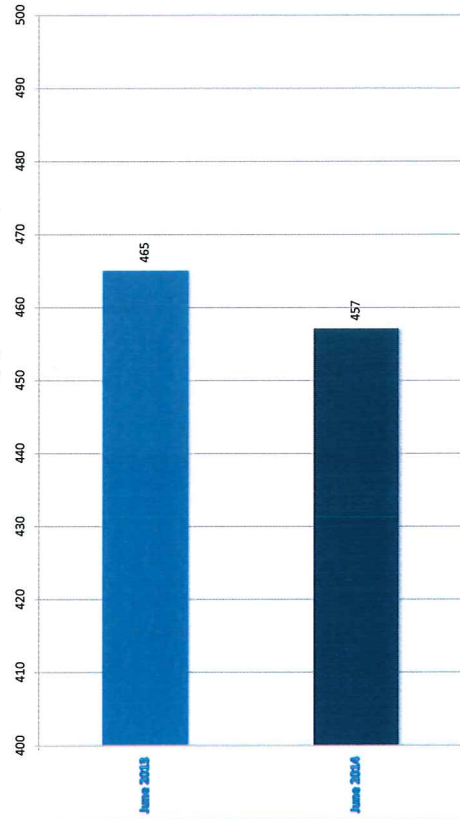
Conference Revenue Statistics & Revenue Share by County



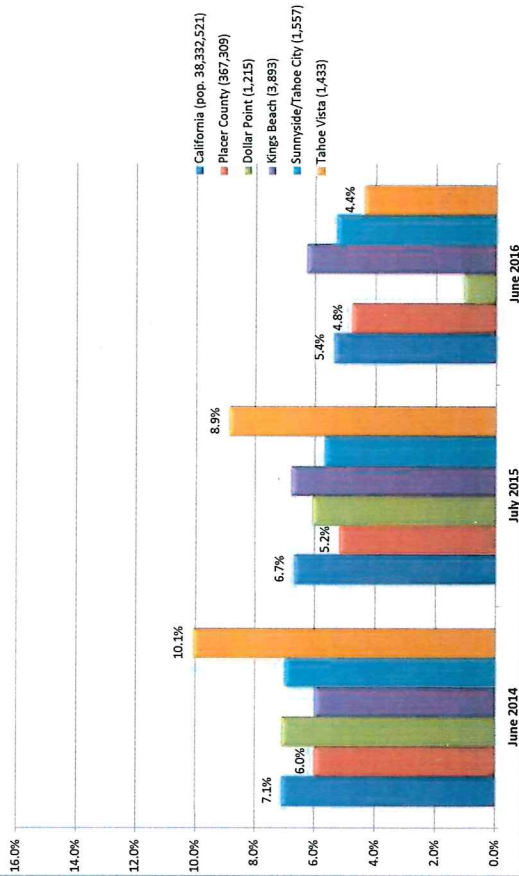
5-Year Annual TOT Collections (Fiscal Year Basis)



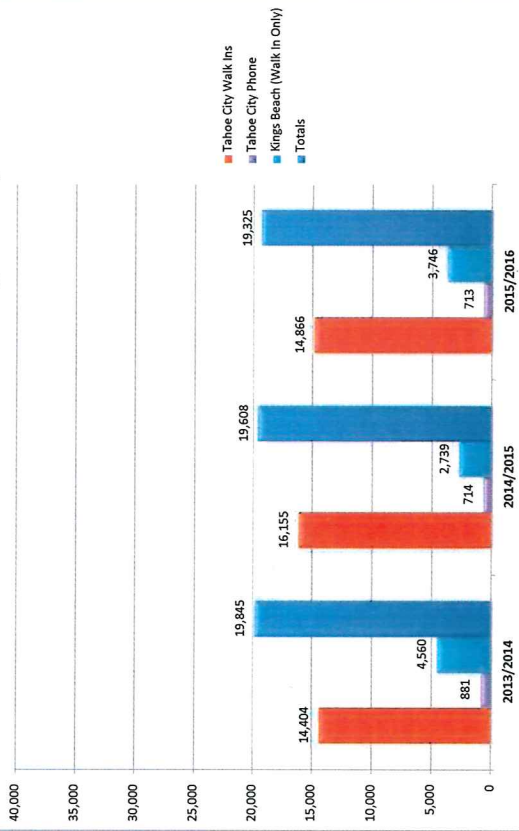
Chamber Membership (# of Members)



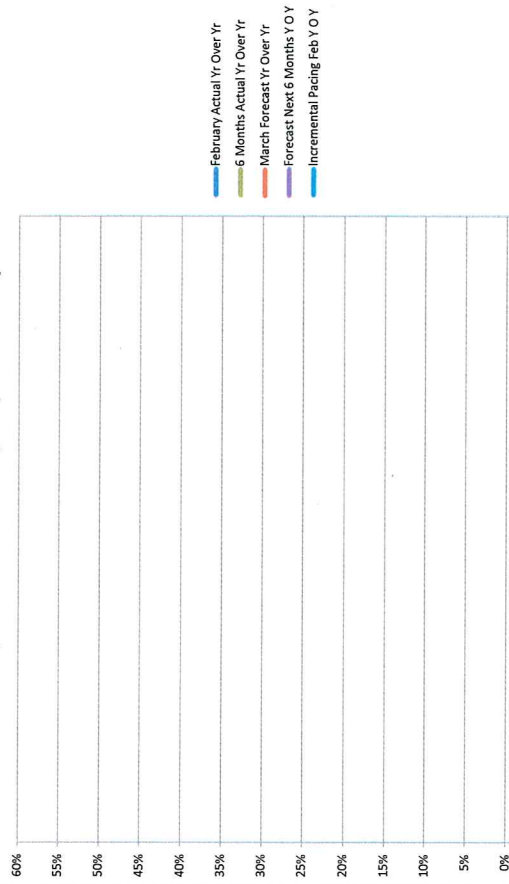
Unemployment Rates by Region



Visitor Information - Fiscal YTD through February



MTrip Destimetrics Occupancy in NLT Comparisons



MTrip Destimetrics RevPar in NLT Comparisons

